


Fundamental Skills for Case Managers

A Self-Study Guide



for Health Training

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Introduction

This self-study guide was developed primarily for the California State Maternal and Child Health Branch's Adolescent Family Life Program (AFLP) and Adolescent Sibling Pregnancy Prevention Program (ASPPP). In order to do their jobs effectively, all case managers in these programs require certain core skills and subject area expertise.

The Center for Health Training has held the Technical Assistance and Training contract for these programs since 1998, providing on-site assistance and workshops for case managers. Throughout this period, there has been a need for ongoing training of new staff in the fundamentals of case management. Although face-to-face training sessions are generally most effective, it has become increasingly difficult for staff to attend them. Therefore, this self-paced study guide was created to provide an alternative means to train new case managers as they are hired.

While it is geared towards new AFLP/ASPPP case managers, experienced case managers and those working in other programs may find this guide a useful review, as well as a tool to help them identify areas they need to focus on in their practices.

The guide is intended to be completed on an individual basis, with a supervisor's involvement and guidance. It can also be completed by groups of case managers working together. Each unit contains written activities that include self-reflection exercises, observations, and the opportunity to apply the knowledge and skills learned from that unit during a role-play or while seeing a client.

What Is Case Management and Why Is It Important?

Case management involves a helping professional working with a client to help the client access services, clarify her/his goals, and develop skills to meet those goals. The more a case manager understands the client, the more s/he can support the client, and the more change can occur.

Unit 1: Essential Communication Skills focuses on developing relationships with clients, effective listening techniques, and responding with empathy. It also discusses confidentiality guidelines and ends with how to effectively interview and assess clients.

Unit 2: Case Management Challenges addresses some of the more complex issues and concerns case managers may face such as professional boundaries, cultural differences, home visiting challenges, crisis intervention, and burnout.

Unit 3: Stages of Development – Adolescents and Their Children provides guidance for new case managers working with pregnant and parenting teens about how to discuss prenatal, infant, and early child development with their clients. The first chapter, “Adolescent Development,” describes the early, middle, and late stages of teen development and discusses key issues to be aware of when working with adolescents. The subsequent chapters focus on communicating with teen parents about the developing fetus, infant and child.

Unit 4: Assessments and Individual Service Plans (ISPs) presents an effective approach to use when conducting client assessments and developing individual service plans. It also discusses follow-up issues that arise for case managers, such as the need to revise ISPs, motivate their clients, and deal with their own reactions to clients’ progress. The unit concludes with ways to most effectively support clients through referrals.

Working with Teens: Building Case Management Skills (Video)

In addition to the written self-study guide, there is an accompanying training video, “Working with Teens: Building Case Management Skills.” This video portrays four different scenarios that illustrate effective case management skills and strategies. Experts offer commentary on the case management provided in each of the situations. For suggestions on how to incorporate the video into staff training, see the User’s Guide that accompanies the video.